

# S&P Global

The S&P Global (“the Company”) Matching Gift Program provides the opportunity to help maximize the impact of employee charitable giving through corporate matched donations.

## ELIGIBLE PARTICIPANTS

All active full-time employees and directors of the Company or any of its subsidiaries are eligible to participate. Retirees are also eligible for up to three (3) years after they leave the Company and are no longer active employees or directors.

The spouse of a deceased employee of S&P Global is eligible for a one-time gift match.

## ELIGIBLE ORGANIZATIONS

- **US organizations:** Only US employees may request a match to an eligible organization in the US. An eligible organization in the US must be tax-exempt under Section 501(c)(3) or Section 170(c)(1) of the US Internal Revenue Code and qualify as a public charity under the code.  
Note: K-12 public and private schools are eligible for a match. Private schools must be accredited.
- **UK organizations:** Only UK employees may request a match to an eligible organization in the UK. An eligible organization in the UK must be a UK registered charity or one that would be accepted by the Inland Revenue as having charitable status.
- **Non US and UK organizations:** For all other countries (non US and UK), employees may choose from a suggested list of eligible organizations in their country that will be made available via a PDF at S&P Global. These organizations have successfully submitted the required documentation to confirm their eligibility in the past and we expect they will be approved for a match (although there is no guarantee until they have passed a vetting process). You may submit an application for other organizations to be considered.  
Note: Before a match can be approved, we will need to establish the organizations’ eligibility which may take several weeks depending on how quickly the organization responds to our request for documentation.

Organizations and activities NOT eligible for matching include: religious, sectarian, political or lobbying, professional associations, fundraising organizations, private foundations, fraternities, sororities, marathons or similar events.

## MATCHING GIFT PROGRAM

### WHAT CONTRIBUTIONS ARE ELIGIBLE?

- Donations must be from an employee’s personal funds, which have been paid directly to an eligible organization in the form of check, credit card or marketable securities with a quoted market value.
- The Company will match only the tax-deductible portion of the gift.
- The minimum gift eligible for matching is \$25 (or the equivalent). For installment gifts, each match request must be submitted separately and meet the \$25 minimum gift requirement.
- The maximum amount matched per employee per calendar year is \$3,000 (or the equivalent). If the employee makes several contributions, gifts will be matched in the order received, up to the maximum annual employee limit for the calendar year.
- The employee’s annual limit is based on the date of the gift.
- Matching Gift applications must be submitted within 90 days of the gift date.
- You may be asked to provide proof of your contribution in the form of an email confirmation, cancelled check, bank statement, credit card statement, or a transfer of stock certificate.

### WHAT GIFTS ARE NOT ELIGIBLE FOR MATCHING?

Gifts that the Company will NOT match include: in-kind contributions, subscription fees for publications, membership fees, insurance premiums, tuition payments, books or student fees, contributions to individuals, fraternities, sororities or labor organizations, dues or gifts payable to national or local alumni groups that are not distributed to the affiliated educational institution, gifts to schools where admission is restricted because of race or creed, gifts for non-scholastic programs such as athletics or stadium construction, ticket purchases, benefits, payments where direct value is received, gifts of eligible employees’ spouses not employed by the Company, gifts of real or personal property (except marketable securities), bequests or life income trust arrangements, tithes or other religious-related financial commitments, gifts intended to fulfill pledges or cumulative gifts from several individuals reported as one contribution, gifts made through participation in marathons, walks or similar activities.

### HOW DOES THE PROGRAM WORK?

#### Online:

The link to the Matching Gift Program website is:

<https://corp-signin.mhf.mhc/easymatch.html>

Legacy SNL employees must use the following link to access the Matching Gift Program site:

[https://corp-signin.mhf.mhc/snl\\_easymatch.html](https://corp-signin.mhf.mhc/snl_easymatch.html)

Following receipt of the request, the program administrator will contact the organization to verify receipt of the employee's gift and vet the organization for eligibility.

#### Paper:

Employees may request matching gifts through a paper-form process as follows:

##### Employee Instructions

- Employee completes Part I of the form.
- Employee mails the completed form and any other necessary documentation to the recipient organization.

##### Organization Instructions

- The organization completes Part II of the form, verifying that the gift was received.
- The form must be signed by an authorized officer of the organization.
- The organization mails the completed form to:  
S&P Global Matching Gift Program  
P.O. Box 8377  
Princeton, NJ 08543-8377  
U.S.A.
- Eligible requests are processed on the following quarterly schedule.

<u>Request Received By</u>	<u>Matching Gifts Paid By</u>
September 30	November 15
December 31	February 15
March 31	May 15
June 30	August 15

Matching Gifts must be requested within 90 days of the gift date. Requests received after that time will not be honored. Receipt of gift will be verified by the organization. For more information, please visit the program website at <https://corp-signin.mhf.mhc/easymatch.html> (Legacy SNL employees must use a different link to access the site: [https://corp-signin.mhf.mhc/snl\\_easymatch.html](https://corp-signin.mhf.mhc/snl_easymatch.html)). The website contains program related information such as Guidelines, FAQs, the ability to view an employee's personal giving history and search for charitable organizations.

If you have any questions, please contact S&P Global's Matching Gift Program via email at [mhfi@easymatch.com](mailto:mhfi@easymatch.com) or telephone 1-(877)-877-2127.

### ADMINISTRATIVE CONDITIONS

S&P Global reserves the right to suspend, amend or terminate this program at any time. The interpretation, application and administration shall be determined by the Company and its decisions will be final.

## MATCHING GIFT PROGRAM

### PART I: EMPLOYEE SECTION

*Instructions:* Complete Part I of this form – one form for each gift. *Please print or type.* Send the form and a copy of the program guidelines with your contribution to the recipient organization.

EMPLOYEE ID NUMBER/RETIREE NUMBER

- ACTIVE EMPLOYEE
- DIRECTOR
- ELIGIBLE RETIREE
- ELIGIBLE RETIRED DIRECTOR
- ELIGIBLE WIDOW(ER)

EMPLOYEE NAME

HOME ADDRESS

CITY/STATE/COUNTRY/ZIP

BUSINESS TELEPHONE, INCLUDING AREA CODE

E-MAIL ADDRESS

BUSINESS UNIT/DEPARTMENT

EXACT DATE OF GIFT

AMOUNT OF GIFT

AMOUNT TO BE MATCHED

CURRENCY USED

TYPE OF GIFT YOU HAVE GIVEN DIRECTLY – PLEASE CHECK ONE:

- CHECK
- CREDIT CARD
- SECURITIES

IF SECURITIES, NUMBER OF SHARES AND NAME OF SECURITY

NAME OF ORGANIZATION

ORGANIZATION CITY, STATE

RESTRICTION OR PURPOSE (IF ANY) OF GIFT

I hereby certify that:

- Neither my family nor I will derive any direct or indirect financial or material benefit from this contribution.
- I authorize the above-named recipient organization to report this gift to S&P Global for the purpose of applying for a matching gift.
- The recipient organization is not religious or political in nature.
- My gift is a voluntary personal contribution, that fully complies with the provisions of the program described herein, and does not represent in anyway a fee for a service or benefit.
- Any misrepresentation by me of the statements made herein will forfeit my rights to any matching contributions and, in addition, may result in violations of law.
- I have not been nor will be reimbursed by anyone for this contribution.
- I have read and understood the guidelines of the S&P Global Matching Gift Program.

SIGNATURE OF EMPLOYEE

DATE



## MATCHING GIFT PROGRAM

### PART II: RECIPIENT ORGANIZATION SECTION

**Instructions:** Verify receipt of gift. Complete Part II of this form. Please print or type. If this is your first matching gift request to S&P Global's Matching Gift Program, please enclose a copy of your Internal Revenue Service 501(c)(3) IRS determination letter (or equivalent document indicating your qualification as a public charity) and a brief description of your organization's primary mission statement or purpose. Mail the completed form and documents to the following address.

#### S&P Global Matching Gift Program

P.O. Box 8377

Princeton, NJ 08543-8377

U.S.A.

EMPLOYER IDENTIFICATION NUMBER (EIN)

ORGANIZATION NAME

ADDRESS

CITY/STATE/COUNTRY/ZIP

TELEPHONE, INCLUDING AREA CODE

FAX, INCLUDING AREA CODE

E-MAIL

WEBSITE ADDRESSES (IF ANY)

DATE GIFT RECEIVED

AMOUNT OF GIFT RECEIVED

CURRENCY

TAX DEDUCTIBLE/BENEFIT GIFT AMOUNT

On behalf of the organization named on this form, I hereby certify and agree that:

- This organization/program meets the eligibility requirements of the S&P Global Matching Gift Program.
- This organization/program is not religious or political in nature.
- Neither the employee nor S&P Global will derive any personal material benefit from this gift or match.
- This organization is in full compliance with the anti-terrorism laws legislated by the USA Patriot Act. In addition, this organization does not and will not promote or engage in violence, terrorism, bigotry or the destruction of any state, nor will it make sub-grants to any entity that engages in these activities.
- The organization shall not use any trademarks, trade names and/or logos of S&P Global in any manner whatsoever without the prior review and written approval of S&P Global.
- The laws of the State of New York of the United States of America (without giving effect to any choice of law or conflict of law provision or rule) govern this Agreement and grant. Each party unconditionally submits to the exclusive jurisdiction of the state and federal courts sitting in New York, New York in connection with all claims arising out of or relating to this Agreement and agrees such claims may be heard and determined in such courts only.
- The organization understands that a Matching Gift from S&P Global does not confer upon the organization any special recognition, endorsement or affiliation with S&P Global.
- I have read and understood the guidelines of the S&P Global Matching Gift Program.

I hereby certify that I am authorized to agree to the above on behalf of the organization.

ORGANIZATION NAME

AUTHORIZED OFFICER'S NAME (PLEASE PRINT)

TITLE (PLEASE PRINT)

SIGNATURE OF AUTHORIZED OFFICER

DATE